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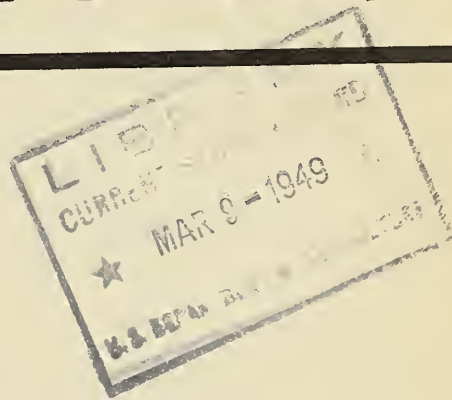
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DECEMBER 1948

# MARKETING ACTIVITIES



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Washington 25, D.C.

# FOOD EXPORTS SET RECORD

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Record exports and continued high domestic percapita consumption are the key facts in the food distribution story for the 1947-48 fiscal year.

# PROBLEMS IN MILK PRICING

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It's a narrow and difficult path that leads to satisfaction between producers and handlers in the Nation's milk markets. Mr. Forest sees progress, however, if problems are solved on the present economic, administrative, and legal bases.

# STORAGE UNDER LICENSE

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For more than three decades the U. S. Warehouse Act has provided for crop storage that is safe and efficient. Much of the success is due Mr. Yohe who has been in charge of the act's administration through most of its service.

# STATE PMA PROJECTS BRING RESULTS

By Leighton G. Foster . . . . . Page 14

Federal-State cooperation under the Research and Marketing Act has given a new and profitable twist to an old first-grader problem: If you have three sweet potatoes and you sell the two of top quality on the regular market and dehydrate the cull for livestock feed you will be money ahead.

# PREPACKAGING MUST BE STUDIED

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Retailers who have tried prepackaging say that it offers advantages but that they may be too costly. Studying methods, products, and the market can forestall trouble.

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Address all inquiries to  
The Editor, Marketing Activities  
Production and Marketing Admin.  
U. S. Department of Agriculture  
Washington 25, D. C.

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Issued monthly. Vol. 11, No. 12

# Food Exports Set Record

By Marguerite C. Burk and Harry Sherr

A record 19,347,000 long tons of food were exported from the United States during the 12-month period from July 1, 1947 through June 30, 1948. This quantity, loaded in boxcars, would make a train stretching from San Francisco, California to Portland, Maine, and part way back again.

Despite the huge food exports, civilian per capita consumption during the fiscal year 1947-48 was 14 percent above the prewar 1935-39 average. United States civilians received 84.7 percent of the total tonnage of United States food distributed. Exports (including military shipments of food for relief feeding programs in occupied areas) accounted for 13.8 percent; United States military services took 1.1 percent for troops stationed at home and abroad, and the non-contiguous territories of the United States received 0.4 percent.

## Wheat Major Food Export

The record export total for the 1947-48 period was slightly greater than that of the 1946-47 fiscal year and the increase was chiefly a reflection of considerably greater exports of wheat and wheat products. The summary of the food exports from the United States by major groups for the prewar period 1935-39 and the three postwar years follows:

Period	: Wheat : : and : : wheat : : products : :(grain : :equiv.):	Other : : grains : :(grain : :equiv.):	: Fats: : and: : Oils:	: Meat : :(carcass : :equiv.):	: Dairy : : products : :(product : : weight):	: Other : : foods :	: Total : food : exports
	: 1000 : long : tons	: 1000 : long : tons	: 1000 : long : tons	: 1000 : long : tons	: 1000 : long : tons	: 1000 : long : tons	: 1000 : long : tons
1935-39:	1,366	1,335	87	55	17	1,363	4,223
1945-46:	10,504	1,306	310	614	816	3,948	17,498
1946-47:	10,629	4,166	220	181	514	3,450	19,160
1947-48:	13,018	2,232	251	68	460	3,318	19,347

Grains, excluding rice, accounted for 79 percent of the total export tonnage and of this, wheat and wheat products represented 67 percent. The large grain totals resulted in part from the plentiful supplies in the United States and the European need for low cost but high calorie foods.

While considerable meat was exported during the war years for military supplies and lend-lease, meat exports have been small in the last

two fiscal years. During the 1947-48 fiscal period meat exports amounted to less than one percent of the total distribution of U. S. meat and meat products, and these shipments went to countries normally dependent on the United States for meat supplies. During this last fiscal year about as much meat was imported as was exported.

Most of the food exported during the last fiscal year was received by countries participating in the European Recovery Program. The U.S.-U.K. occupied area of Germany received a larger share of the total food exports from the United States than did any other single destination.

More than 60 percent of the total food exports were purchased by the U. S. Department of Agriculture specifically for export programs under price support operations. Among the principal commodities exported the Department purchased major shares (nearly 70 percent or more) of wheat and wheat flour, potatoes, non-fat dry milk solids, dried fruits and eggs, and smaller portions of rice and other grains, peanuts and dry beans and peas.

#### USDA Coordinated Exports

Government procurement was carried on with a high degree of efficiency considering the obstacles confronted in moving grain for export. Ship and freight car shortages made it essential that rail and shipping contacts be coordinated with great care. Loaded boxcars waiting for freighters at ports would have meant car shortages elsewhere and greater strains on the over-burdened system. Freighters waiting half-loaded at car-short ports would have thrown the export movement out of schedule.

The problem was eased in some measure by exporting substantial quantities of grain from Gulf ports closer to grain supplies. By controlling the flow of grain to port and maintaining close liason with claimants, the Department was able to keep the record export supplies moving.

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#### CCC ANNOUNCES POLICY ON SALES DURING 1949

The Commodity Credit Corporation announced December 10 that during the calendar year 1949 domestic sales of CCC-owned or -controlled farm commodities generally will be made at not less than the lowest of the following: (1) a price that will reimburse CCC for its costs; (2) 90 percent of the parity price; or (3) a price halfway between the support price, if any, and parity. In 1948, under existing legislation, sales may not be made at less than the parity or comparable price.

The policy announced by the CCC today coincides with restrictions included in section 202(a) of the Agricultural Act of 1948 and thus will eliminate the need for any change on January 1, 1950, when compliance with section 202(a) becomes mandatory. Action on minimum sales prices for 1949 was taken because present restrictions expire on December 31, 1948, and the restrictions imposed by the Agricultural Act of 1948 are not mandatory until 1950.

# Problems in Milk Pricing

By H. L. Forest

Everyone in the dairy industry has run into some of the difficulties of pricing milk. Producers who sell milk have one kind of pricing problem. Dairy men and processors who buy milk and dairy products have another. And still a third is encountered by Government officials who help administer the laws relating to the issue.

One way in which the problems of the Government administrator differ from those of members of the milk trade is that trade members must develop pricing policies for one firm only. If the policies happen to be erroneous, presumably the forces of competition will set them right in due course. On the other hand, the Government administrator is engaged in fixing prices for whole markets, in which the correcting influences of competition while by no means eliminated are considerably dampened. It takes longer for competitive forces to work, and the effects for entire markets are harder to discern. Moreover, there is always the danger that forces set in motion by faulty decisions cannot be reversed.

The problems of Government administrators engaged in milk pricing can be grouped as information problems, economic problems, and legal and administrative problems.

## The Information Tightwire

In a democracy the people have a right to know of the actions, and effects of actions, taken by their Government. To this end funds are appropriated so that our Government may inform the people through the newspapers and other media of its actions. At the same time, there are well-established limits to publicity activities by which a governmental agency might attempt to expand its programs. The path between furnishing adequate public information, on the one hand, and avoiding improper publicity activities on the other, is a narrow path down which the Government administrator must tread with caution.

In general, price fixing by the Government is a matter of economic predictions. The prices fixed are those which are to apply at some future time. As tools for making the economic forecasts that are necessary to fix prices for the future, economists have devised all sorts of curves, graphs, charts, tables, and analyses.

But in spite of all these means, the ability of economists to make economic forecasts is extremely limited. Short-run changes in the dairy products markets are erratic. Butter prices fluctuate widely from day to day; cheese prices change every week. The prices that condenseries pay to farmers for milk may change twice in a month. The factors that affect supply and demand also change rapidly and are highly unpredictable. Weather, the greatest factor of all, is both unpredictable and uncontrollable.

The situation with respect to the prices of dairy products at the end of October 1948 is an example of short-run changes in the dairy products markets. By that time an excellent corn crop was assured. But long before such a crop was assured--in fact, at the first indication such a crop was possible--far-reaching effects in dairy prices had become apparent. This was true even though the corn had not yet been harvested, let alone transformed into increased milk supplies.

The first declines in dairy product prices began late in July. They were the result, apparently, of the aggregate opinion of traders in dairy products as to the effects of increased feed supplies on milk and dairy product prices. In late October, the increased corn and feed supplies had not yet been transformed into increased milk supplies. No one could be sure what result the more plentiful feeds would have on milk supplies later in 1948 and early in 1949. Yet at this point the Government did not undertake a major reversal of its price policies. The October declines were based to some extent on mere prospects of increased milk supplies. A reversal was considered inappropriate until the increased supplies were actually at hand. The Government administrator's problem is to distinguish between short-run and long-run changes. The purpose of the Government's price-fixing program is to bring some stability into fluid milk prices and to neutralize the effects of mere day-to-day fluctuations.

The pricing and administrative provisions set forth in milk orders affect the locality and intensity of milk production, the locality and kinds of equipment for receiving and processing milk, and the consumption patterns of residents in the milk-marketing areas. The Government administrator is anxious to know what these effects are and whether they are likely to improve efficiency in the milk industry. The difficulty is that the effects develop so slowly.

### Legal Angles Are Inevitable

The legal and administrative problems are always present, and to a large extent they are the kind of problems common to Government administration in general. The legal problems of milk pricing are numerous and complex. A Government administrator cannot avoid legal problems, because the actions and procedures of the Government are necessarily legal actions and procedures. In the field of milk pricing in particular the Government is engaged in making law, since there is little precedent for this type of regulation.

One important administrative difficulty in this field is the recruitment of employees who are adequately trained and sufficiently experienced in the work of governmental milk price fixing. To do this work properly, a specialist in milk marketing should be thoroughly familiar with procurement, processing, and distribution in the dairy industry. He should be a trained economist--preferably with 2 years of intensive graduate study in economics and statistics. He must know something of administrative and constitutional law. He must have more than a fair knowledge of accounting, particularly of accounting procedures in the milk industry. And if besides all this he were a psychologist, it

might help him to understand the conflicting motives of the persons and groups who testify in public hearings and to resolve their conflicts.

Obviously, all these characteristics are rarely to be found in one person. So it is necessary, through administrative techniques, to synthesize such "persons" from the individual characteristics found in several real persons.

### All Rights Are Considered

Another big administrative difficulty is the time-consuming procedures--the red tape--through which Government agencies so often move before decision and action can be taken. Yet procedures are indispensable in a democratic government. Farmers, milk dealers, and consumers are vitally involved when the Government acts in the fixing of milk prices, and it is necessary to move in a way that the rights of them all are considered and safeguarded.

Hearings should be held only after adequate notice, and interested persons and groups should be able to take exception to Government proposals and appeal to the courts from Government decisions. (This does not mean that procedures cannot sometimes be speeded up.)

The recently enacted Administrative Procedures Act provides detailed procedures that must be followed to make administrative regulations effective. The Act was designed to protect people who are affected by governmental regulations. It makes a good many difficulties for the Government administrator because all the aspects of the Act have not yet been litigated, and the precise meaning of various provisions is not always clear.

### The Problem of Interpretation

Consequently the administrator is constantly at the risk of misinterpreting one of these provisions and nullifying the regulation. And nullification of a regulation does not leave everyone who is effected just where he was before. Ordinarily, some have complied with the regulation and some have not. If there is one difficulty that pains a Government administrator more than another, it is to find that some people because they have not complied with a regulation have gained an advantage over others who have complied.

There is always a danger in crucial situations of taking short cuts, of acting outside the normal procedure set up for dealing with the Government's price-fixing agencies. Government administrators prefer milk handlers to use the ordinary procedures, which have been set up to protect the rights and interests of all persons and groups affected by Government milk actions. If methods are used that are not on an economic, administrative, and legal basis, some of the people affected are likely to be losers. But if the processes of milk price fixing can remain on the present basis, continued improvement in the program can be expected, and some stability can be obtained in dairy industry affairs.

# Storage Under License

By H. S. Yohe

When a farmer deposits his crop in a federally licensed warehouse he knows that his receipt for his commodity is literally as good as gold. He knows that under provision of the U.S. Warehouse Act the warehouseman has been thoroughly appraised by the Department of Agriculture and his facilities for proper storage carefully checked. More than that, the farmer knows that the operation of the warehouse will be looked into several times a year, and the work of his superintendent and of the licensed samplers, inspectors, graders, and weighers closely scrutinized.

This careful supervision not only benefits farmers, but also bankers, warehousemen, and many others connected with the over-all business of marketing. For a receipt issued by a licensed warehouseman is clear proof that the commodities evidenced by the receipt are in the hands of a reputable business man, that the exact quantity stated on the receipt is in storage--and good storage, and that the quality is as represented.

## Sound Warehousing Often Ignored

Still, in periods of high prices and prosperity there is a temptation to ignore sound business principles and try short cuts. It is true in all fields, and particularly so in the handling and storing of agricultural products. Many farmers and merchandisers handling their commodities are paying too little attention to the warehousing of their products. In fact, too few people are aware of the benefits of the quiet and efficient service of the United States Warehouse Act and only a handful know that it was born more than three decades ago during several of the stormiest months in world history. When the armies of Europe were mobilizing in those feverish days in mid-summer, 1914, the great cotton center, Liverpool, England, closed on July 31 and the cotton market of the world collapsed, taking United States cotton exchanges down with it.

The day the New York Cotton Exchange closed, Aug. 1, middling cotton was quoted at 10.75 cents a pound. By the middle of August, unofficial quotations were made at 10 cents on middling cotton and by October, unofficial quotations had dropped to 7 cents. At many interior points cotton had no takers at 5 cents a pound. The greatest cotton crop in history was maturing rapidly and cotton farmers could find neither buyers nor credit. Production debts were due and throughout the country popular sentiment echoed the farmers' need with the cry: "Buy a bale of cotton."

It was largely a futile plea. The 14 million bale crop brought nearly 50 percent less money to the farmers than had the preceding year's harvest of 2 million fewer bales. Dollars were plentiful in the banks of the North and East but none of them were available for loans on cotton. It was then that planters began to enlist the help of legislators and Department workers sympathetic to their problem, and after a two-year fight in Congress for stability in marketing and finance the re-

sult was the United States Warehouse Act. It became a law too late for the emergency of 1914, but it met a need so basic that the law which exists now is essentially the same that has served through the years.

The Warehouse Act was not designed merely to help farmers through emergencies such as that of 1914, but to aid in correcting some marketing evils which have always plagued producers. The developments since the First World War have brought many changes in marketing techniques but many of the old problems such as improper or lack of farm and public storage, unsound public warehousing practices and disorderly marketing still exist. For that reason the services insured by the Act have not gone out of date.

The Act brought another advantage--a recognized negotiable warehouse receipt--and through this producers were provided with a means of security acceptable to the bankers for loan purposes regardless of the location of the banker and the issuing warehouseman or what the banker might know about the borrower. In other words a receipt was established which translated into terms of value the particular product placed in the warehouse by the depositor.

### Operations Expanded in Twenties

During the first few years the Warehouse Act was in effect, its coverage was limited to cotton, grain, tobacco, wool and flaxseed, but in 1923 the law was expanded to its present scope giving help to producers of nearly all staple agricultural products. In the last 15 years around 2 billion dollars worth of farm products have annually been stored under Warehouse Act supervision and no banker or farmer has ever suffered loss on farm products stored in these warehouses through fraudulent operations. As of December 3, 1948, there were 1,384 licensed warehouses handling a dozen major commodities.

Impressive as the record may be there are gaping holes in the total service. Some states have no Federally licensed warehouses at all and provision for some commodities is woefully inadequate. Licensed warehouse capacity for the various crops ranges from provision for 75 percent of the cotton crop to 8 percent for grain and even less for tobacco and wool. Thus it is clear that in some important agricultural States the number of federally licensed warehouses is small compared with the number of public non-federally licensed warehouses.

The U. S. Warehouse Act gives the Secretary of Agriculture authority to supervise warehouses operated by persons licensed under the Act. Further, it empowers the Secretary with the right to inspect periodically these warehouses to insure that such operators comply with the official regulations. However, whether or not a warehouse chooses to be licensed is purely optional.

Operators who give the plan a trial quickly become aware of benefits under licensing. Reductions in insurance rates are common because the character of supervision eliminates certain fire hazards and results in better record keeping. Federal audits in many cases supplant costly

audits and inventories formerly made privately. Because of the stability of the U. S. Warehouse receipts and their acceptability in trade channels in many areas, producers have no hesitancy about making full use of licensed facilities, and consequently, the operator may well be preferred by depositors. In some States a Federal license is a "must."

In order to qualify for a license an operator must have a good business reputation, a certain financial security and a suitable and properly equipped warehouse. He must furnish an acceptable bond in an amount fixed by the U. S. Department of Agriculture and he must employ qualified personnel with knowledge of how to weigh, inspect, grade, and care for products. All commodities stored are inspected for quantity, condition, quality, and insurance coverage. This information must be so accurate that the receipt will represent real value and convey to a banker practically all he would learn if he were to conduct the inspection personally.

When the warehouses are visited by the Federal inspectors, the product is carefully checked against the stated condition of the product as described on the outstanding warehouse receipt. Moreover, the warehouseman must have on hand sufficient quantities of all products, by grade, to cover all outstanding warehouse receipts. The holder of the receipt, therefore, can be confident of his security because the product cannot be removed legally until the receipt is returned to the warehouseman. Neither can a receipt ever be used legally unless the products are actually in the warehouse at the time the warehouseman issues the receipt.

#### Dry Storage Predominates

Practically all of the products stored under the Act are placed in "dry", non-refrigerated storage. This puts some limitation on the range of commodities, but it is still a fairly broad group. The list includes: cotton, grain, wool, tobacco, nuts in the shell (peanuts, walnuts, filberts, pecans), broomcorn, dry edible beans, cane and maple syrup, extracted honey, dried fruit, canned fruits and vegetables, cottonseed, bluegrass seed, alfalfa seed, bent grass seed, cherries in brine and cold pack fruit.

The value of the Act to farmers can be put in straight forward language. It helps them get credit generally in keeping with the value of their crops in storage. With licensed warehouse facilities available a farmer can make up his mind about selling with some freedom from the pressing interference of maturing production loans. He can avoid the worry and uncertainty which always arises when a valuable crop is stored in faulty or questionable shelter or with a warehouseman unknown to him. He is freed from a task it is difficult for him to perform--namely to investigate the financial and business responsibility of a warehouseman. The receipt issued by a federally licensed warehouse is always distinctive and carries its own mark of value. Furthermore the producer knows how much he has in terms of exact units, not just so many "loads." Finally, he may receive lower insurance rates because of the increased security of the federally inspected warehouses.

All these benefits to farmers, warehouse operators and bankers are not secured without regular surveillance by inspectors of the Warehouse Supervision Division of the Marketing Facilities Branch of the U. S. Department of Agriculture. Most of the work--perhaps 85 percent--consists of inspection and supervision of the facilities under license. This burden can be lessened somewhat through cautious selection in licensing of warehouseman. Still, as in any broad and diverse regulatory program, irregularities--even criminal violations of the law--are occasionally uncovered.

All outstanding original receipts are credit instruments. They may, at the moment, be in a bank as collateral to a loan running as high as 70 to 90 percent of the value of products represented by the receipt. They may be in the hands of the farmers awaiting a favorable selling date. Wherever located they are evidence of products that must be readily available if obligation or plans based on their existence are to be carried out.

### Receipts Are Matched by Stocks

Therefore in a visit to a warehouse, a Federal inspector asks not only for copies of receipts that have been issued but also for all receipts that have not. He knows in advance whether he has to account for 1,000, 5,000 or any other specific number of receipts. He knows the number of each bank receipt obtained only under orders approved by the Department. He has the information necessary before an accurate check can be made. Because all receipts are prepared by the same printer, with complete registers maintained on all printings, wrongful use of the receipts is reduced to a minimum. When violations are attempted they are soon detected and necessary action is taken to handle the wrongdoers.

Checks against the exact quantity of product is difficult, particularly in the case of grains. Only through painstaking measurements, computation and tabulation can the stores in bins of limitless shapes and sizes be determined without the expense of an actual weighing of the stock. For each bin, the bushel-per-foot-of-depth capacity is computed and against this factor must be considered the kind, grade and condition of the product, for all these elements effect quantity to a degree. In a bin with a capacity of 100,000 bushels--and some are much larger--considerable variation must be taken into account. Only through such precaution is it possible to detect frauds readily.

In many producing areas storage capacity is not sufficient to handle the local grain and this situation sets the stage for an occasional warehousing fraud. For example, an operator of a country elevator of 25,000 to 50,000 bushels capacity may accept a farmer's grain, issue him a country warehouse receipt, and then immediately forward that grain to some terminal or subterminal elevator without the permission of the depositor. This, of course, is contrary to law generally.

In other areas the operator may accept storage until his house is nearly filled, and then, without issuing receipts of his own, forward

the grain to some other elevatorman for storage. Here again, this may be done without the consent or knowledge of the owner.

As a result of such operations, some warehousemen with storage space for 100,000 or 200,000 bushels have been known on occasion to have forwarded as much as 3 to 10 times their own storage capacity. In one case turned up by the Federal inspectors, a country elevator operator had forwarded some excess grain to another elevator man several hundred miles away, who in turn, when his facilities were filled, had sent on some of this grain to other elevators, one as much as 500 or more miles distant. The situation became so involved that neither the producer nor the original warehouseman knew where the grain was located and neither had a receipt for it.

To forestall such confusion, the Department has taken the position that federally licensed warehousemen may not, without consent of the owner, forward grain which is tendered to them for storage. More elevator space in areas of heavy production would be an answer to this problem. Meanwhile, arrangements should be worked out to have necessary shipping of grain from one elevator to another done in an orthodox way.

#### Insurance Coverage Is Examined

Occasionally, the Division inspectors are confronted with insurance difficulties--where policies are inadequate or vague in coverage detail. Many times it is hard to tell just what protection is given by policies, and with high prices of agricultural commodities it is becoming more and more difficult each year to get coverage in sufficient amount. Particularly has this been a problem recently. For example, the limitations in amount that underwriters are placing on peanuts are entirely inadequate to cover the risks.

Another problem encountered by the inspectors is the soliciting of grain on the basis of free storage. In such cases it has been reported that the grain has not been stored at all but promptly sold or milled, in which instance storage charges are not warranted. However, even though the handler is able to make a financial settlement when the producer wishes to dispose of his grain, such a plan works against the farm programs of the Department and the orderly marketing which the producer seeks under provisions of the Act.

Occasionally inspectors have discovered that in certain heavy wheat producing areas elevator operators have levied tolls ranging from 5 to 18 cents per bushel in addition to the receiving and delivery charges. In other words, the price they paid the farmer was from 5 to 18 cents less than that at which they sold the wheat to other merchandisers or millers. The construction of adequate warehousing facilities in producing areas would go a long way toward breaking up such practices common at a time when prices are high, space limited, and farmers are not pressed financially.

The law imposes the responsibility upon the Department to see that charges are not unreasonable or discriminatory. With the general in-

creases in the cost of living, warehousemen have found it necessary to pay higher wages and salaries and generally more for all items entering into their cost of operation. The result is that for the last several years charges of many warehousemen have risen markedly.

In order to determine what are fair charges a great deal of correspondence, and occasionally conferring, are essential. Sometimes the terminology covering tariffs is so indefinite that it is impossible to tell what a producer would be charged for the storage of a bale of cotton or a bushel of wheat. Occasionally, a warehouseman wishes to treat the grain tendered to him as "sold" rather than simply stored. More than one operator has resented Federal interference in such matters and labeled it an attempt to "fix" warehousemen's rates and policies. This of course is not the intent of the Department. It does, however, ask that whenever increases in rates are proposed, sufficient data be supplied to justify the increases.

Irregularities are, of course, the exception. But it is only through constant and efficient inspection that the integrity of the warehouse receipt can be maintained.

Proof that the Warehouse Act has served well is found in the fact that the leading agencies financing stored agricultural products are continually seeking loans secured by Federal warehouse receipts. Strong evidence that the legislation and its administration are sound is shown by the fact that the Act has weathered two World Wars and several depressions without the failure of a single federally licensed warehouse. For those few who have felt that the Warehouse Act amounts to an intrusion into private business, there are hundreds who ask for "more" of the Act and its administration. They recognize it as a means of helping producers and private industry to operate more efficiently together.

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#### GRAIN PRODUCTS INSPECTION SERVICE MAY BE OFFERED COMMERCIALY

The Production and Marketing Administration of the U. S. Department of Agriculture recently initiated the procedure necessary to extend inspection service on a voluntary basis for grain products including flour, cereals, vegetable oils, soya products, feeds, and the like which are offered for sale on commercial contracts in domestic trade and for export.

This action has been taken in response to frequent commercial requests, and is in accord with legislative authorization. Heretofore, Government inspection service has been limited to Government purchases of these products.

Proposed regulations governing the inspection have been filed with the Federal Register of the United States and views of interested persons are being considered with the hope that the service can be put into effect soon.

# State RMA Projects Bring Results

By Leighton G. Foster

Some ways to reduce local crop surpluses, move better products to the consumer and, in the process, improve and expand market outlets for the farmer have been demonstrated in Research and Marketing Act projects in North Carolina. The work is being developed by the Division of Markets of the State Department of Agriculture.

Unusual success in handling a sweetpotato surplus and in attacking problems in marketing apples, peaches, cantaloups, sweet corn, cotton, and other crops were reported to the U. S. Department of Agriculture from that State. The work provides an example of the effectiveness of marketing service activities conducted by the States under cooperative arrangements with the Federal Department, which supplies half the funds. Similar work is being carried on successfully in other States, and the Carolina results may be a helpful guide in expanding and intensifying activities elsewhere.

The chief "problem crop" in North Carolina is sweetpotatoes. When a project to help solve farm marketing difficulties was agreed upon by U. S. D. A.'s Production and Marketing Administration and that State, this was one of the first problems attacked. The principal needs were found to be diversion of low-grade stock from food channels in a way that brings some return to growers from the diverted supply and leaves only higher-quality potatoes for food use; the development of central assembly points where the product can best be stored, cured, graded, packed, and sold on a competitive market; and expanded storage facilities so that the crop can be sold throughout the year instead of being dumped on the market at harvest time.

## Waste Turned Into Profit

In accordance with recommendations developed in this project, low-grade sweetpotatoes were processed at dehydrating plants, and about 500 tons of livestock feed was produced from them. Because the product was new, the marketing specialist in charge of the project assisted, successfully, in finding outlets for the feed. Arrangements were made for the construction of six additional storing and curing houses, with the specialist advising on their location, construction, and operation. He also helped in the establishment of a sweetpotato auction market at Tabor City, North Carolina, which handled 300,000 bushels, and, for the first time, gave the growers the advantage of competitive marketing with top prices for high quality. Both producers and buyers were pleased with the market and planned to continue it; and a second market was organized at Clinton on a similar basis. The growers were encouraged to pack their crop so as to meet standard grades.

The most important result of the sweetpotato work was a noticeable improvement in quality of the product packed for fresh market by shippers who utilized dehydraters and diverted the low-grade product to

livestock feed. There was a decided gain in demand, and a wider and more constant distribution at better prices was reported.

Improvements were achieved in marketing several other crops. Greatly reduced acreage and high prices for strawberries during the war had caused producers to relax in grading and packing a high-quality product. Acreage has increased again, raising new marketing problems. The specialist demonstrated to growers the importance of "facing" the strawberry cups, a practice encouraged by buyers, who paid a premium of \$1 to \$1.25 a 24-quart crate for faced berries. The number of growers following the practice increased through the season.

#### Consumers Reject Green Fruit

The most serious problem encountered in connection with peaches and cantaloups was the tendency to pick the fruit while it was too immature. Information on proper harvesting was given, and growers were advised of the adverse reaction of consumers to immature fruit. Apple producers and packers were encouraged to install more and better grading and packing facilities, to use standard containers, to pack a uniform-quality crop, to buy and sell on the basis of grades, and to use central packing and storage facilities so as to foster more orderly marketing.

Lettuce producers were encouraged to improve the quality of their pack, to use standard crates and standard counts per crate, to adopt better handling methods including icing before shipment, and to develop more and better marketing facilities. Growers of sweet corn for the fresh market were advised on proper harvesting, packing, grading, and loading, and urged to use the official grades.

Growers of white potatoes were encouraged to use washing and drying facilities, and to exercise greater care in handling the product. They were informed of the value of feeding small and low-grade potatoes to hogs, and the results were encouraging; growers said they planned to use more for this purpose the next season, thus keeping the inferior product off the food market.

A major problem in marketing cotton also was attacked and progress made toward its solution. This is the damage to cotton fiber in the ginning process, estimated to cause a loss in value of ginned cotton amounting to \$250,000 to \$750,000 a year in North Carolina alone.

In cooperation with the Cotton Branch of PMA and the Extension Service, inspections were made of 240 gins in many counties at the request of county agents. Tentative recommendations were made for long-term improvements in equipment and for checks of fire risks and safety precautions. Information was provided also on local markets and marketing practices.

North Carolina's cotton industry spends annually from \$1,500,000 to \$2,000,000 for new ginning equipment. The director of this marketing work was consulted in a single month on the selection of about \$400,000 worth of gin machinery, indicating the opportunities afforded by this

service. Early results point to a one-grade improvement in cotton ginned thus far.

In another project, North Carolina purchasers were advised that hay they were buying from outside the State as No. 1 grade was actually no more than No. 3. A conference resulted in notification to shippers in one of the major hay-producing States that buyers in Virginia, West Virginia, Delaware, Maryland, and Kentucky wanted to purchase on the basis of U. S. grades. Agreement was reached that consignors would sell on that basis, with certificates attached to the invoices.

Encouragement was given also to development of more storage facilities for the corn crop in the State. Much of the crop sold at harvest time in North Carolina goes at prices below those for corn from other States, due partly to a lack of proper storage facilities.

Research and Marketing Act projects of this nature are conducted by a number of State Departments of Agriculture or Bureau of Markets, in cooperation with PMA. The work outlined was selected to illustrate some of the types of effective work being done and the results accomplished to date. There are other such examples in other States which will be reported from time to time.

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#### LEAFY WASTES DRIED FOR POULTRY FEED

Thrifty housewives may be shocked to hear it, but USDA chemists say that in harvesting and processing some vegetables we waste more vitamins and other valuable food elements than we get when we buy those vegetables at the corner grocery. Salvaging this waste is no easy job, but the Department researchers have made a start at it through utilizing meals made from dried leaf wastes in poultry feeding.

Every year truck farmers grow tons of vegetable leaves that never find their way to market. These leafy wastes--rich in protein, minerals, and several vitamins--are an unavoidable part of normal truck-crop production. They include cabbage, spinach, cauliflower, and broccoli leaves; beet, turnip, and carrot tops; and the vines of peas and lima beans. The total yearly volume of these "wastes" is estimated at 4 million tons, while the marketable portion of these crops sold fresh or processed each year amounts to only some 3 1/2 million tons.

Since human palates are finicky, there is little chance that we can ever consume these leafy wastes directly. But scientists of the Bureau of Agricultural and Industrial Chemistry, working at the Eastern Regional Laboratory near Philadelphia, propose to bring these vegetable leaves into the kitchen indirectly--in the form of poultry--fattened on nutritious meal salvaged from dried and processed leafy wastes. Preliminary tests show that meals from dried leaf wastes have generally as good or better nutritional value than alfalfa meal, commonly fed to poultry.

# Prepackaging Must Be Studied

By Oscar R. LeBeau

In the big supermarkets, the housewife is able to select from a wide array of prepackaged, preweighed, and prepriced items most of the groceries she wants. Among the principal items missing in most stores are prepackaged fresh fruits and vegetables. There are several reasons why this is true, and important is a lack of information on prepackaged fruits and vegetables. Like most businessmen, retailers have been reluctant to venture into new and untried fields. For that reason information based on practice is welcome.

In a mail survey recently completed, 44 farmers' cooperatives reported their activities and experiences in the field of prepackaging to the Farm Credit Administration. This survey was part of an FCA project conducted under the Research and Marketing Act of 1946 and its results indicate that any cooperative that considers entering this field had better have some assurance that the advantages of the method will offset the additional costs.

## The Advantages of Prepackaging

Prepackaging--the packaging of fruits and vegetables in consumer-size containers--generally requires additional expenditure for equipment. It offers a good deal too. According to the cooperatives in the business it provides the following advantages:

1. It increases the quantity sold per consumer.
2. It makes retailing easier and better.
3. It permits brand identification.
4. It gives cleaner and neater displays.
5. It increases the shelf life of produce.

Increases quantity sold per consumer.--Prepackaging often encourages the purchaser to buy a larger quantity at a time. This is particularly so if the prepackaged item is favorably priced. For example, not many years ago most housewives in buying oranges bought a dozen at a time. Today, by buying an 8-pound mesh bag of oranges a housewife buys a dozen and a half. Thus markets handling prepackaged oranges are persuading many purchasers to take home half again more than before.

Having purchased more, housewives have more oranges handy when they want them, and the family tend to eat them more freely. This leads to a substantial increase in the total volume consumed--an important consideration to every producer and shipper.

Makes retailing easier and better.--Prepackaging speeds the consumer's selection and purchasing. It makes the commodity a self-service item. The fact that a prepackaged item doesn't have to be packaged, weighed, and priced at the counter speeds up the check-out and makes it more accurate.

Permits brand identification.--One important feature of modern merchandising is brand identification. Heretofore the large, attractive fruit and vegetable containers bearing brand names have usually passed no farther along in the marketing channel than the retail store. Prepackaging makes it practicable for these brand names to accompany a product right into the consumer's kitchen. Each package then becomes a good advertisement for the original packer . . . if it contains a good product.

Makes cleaner and neater display.--Attractively packaged produce has greater eye appeal and display advantage. Consumer-size packages skillfully displayed stimulate sales. Carefully arranged packages keep a display looking orderly with a minimum of attention. Consumer-size containers also provide greater health protection because human hands and dust come in contact with the prepackaged food less frequently--an obvious advantage in sales appeal.

Increases shelf life of produce.--Prepackaging prevents excessive pinching and rough handling of perishable produce, reduces shrinkage and waste. Every shopper is familiar with how unappealing a bin of fruits or vegetables can become after it has been picked over several times. Rejected produce often has to be discarded or sold at greatly reduced prices. Included with the expense incurred is the cost of containers and freight.

#### Extra Cost Biggest Drawback

A number of knotty problems must be solved before some of the advantages of prepackaging can materialize. Half of the cooperatives reported container problems. These involve such items as costs, size and type, feasibility, durability, and satisfactory protection in transit. Other problems mentioned included labor costs, the expanding of consumer acceptance, insuring a high-quality pack, increasing of efficiency in distribution, improving the required packaging equipment, and interesting members of cooperatives in the desirability of prepackaging.

The biggest draw-back to prepackaging at present is the difficulty of financing the additional cost of putting products into consumer-size packages and the expense for the master containers. Many associations have found produce buyers reluctant to absorb these additional burdens. For prepackaging to have a fair chance, container costs must be held to a moderate level and the trade must be impressed with the desirability of its absorbing a share of increased container costs.

Two very important considerations are, first, developing the best size and type of consumer package, and then sizing the commodity to fit the selected container. Too many different sizes of containers slow up the packaging operation. Several leading container manufacturers have done much toward developing satisfactory new-type containers. They now offer appropriate containers of assorted sizes for most fresh fruits and vegetables.

A fair degree of visibility is essential in the prepackaging of most

items. Some types of transparent films tend to fog in the presence of certain respiratory gases. Progress has been made in developing film of superior transparency.

To be successful in marketing, the unit container must be durable enough to reach the consumer in a neat and unbroken condition. Other difficulties have been failure of seams, breakage of bags, cracking of transparent windows (owing to temperature changes), and deterioration of containers under cold-storage conditions.

Among the expenses that many prepackers try to avoid is that of providing a master container. This container is any outer protection suitable for holding a dozen or so smaller consumer units. Master containers provide protection in transit and in storage, and make handling easier.

### Master Containers Prevent Crushing

They are necessary in many instances where products are prepackaged at shipping point, since breakage of even a small number of retail packages makes them less salable and cuts down handlers' returns. But, there has been a tendency to try to get by without the additional expense of a master container. For example, citrus associations in Texas seldom use brace boxes in shipping 8-pound bags of oranges. Shipping 10 such bags in a 40-cent master crate would add approximately 4 cents to the marketing cost of each 8-pound bag. Instead, the mesh bags are loaded in trucks or as upper tiers in railroad cars. Some of the fruit naturally is bruised and is less attractive by the time it reaches the retail stores. Some commodities may require the development of an inexpensive master container that will reduce handling costs and provide necessary protection in transit and in storage.

How to hold down labor costs, a principal problem in prepackaging, is one that calls for adequate equipment and good management. A good many cooperatives have undertaken prepackaging with a minimum of additional equipment, but the hand labor necessary to operate the equipment has added substantially to prepackaging costs. The handling of numerous consumer units has also increased the amount of work required. The per unit cost of labor must be held to a reasonable figure if the prepackaged item is to be sold at prices at which it can compete with bulk produce of the same quality.

Whether it pays to prepackage a given item depends on the volume that can be marketed and that needs to be marketed. If sales are to be expanded, consumers must be convinced that it is to their advantage to buy prepackaged produce at the price offered. If the total number of consumers is to be increased substantially, consumer-size packages must be offered at a price falling within the purchasing range of a sizable part of the population--a part that includes families of moderate income as well as families of large income.

Thus selling prices of prepackaged items must always compare favorably with prices of items sold in bulk. At the same time, the price re-

ceived must be large enough to compensate growers and shippers for the increased labor and container costs.

New additional outlets need to be developed for the inferior fruits and vegetables that do not meet the desired specifications for marketing in consumer-size packages. The most common practice is to divert this type of produce to canneries and juice plants. Some products, like white potatoes, may be utilized for the production of useful byproducts such as flour, starch, and alcohol. Others are suitable for livestock feed either in fresh or dried form. All fruits and vegetables have fertilizer value.

Sometimes, in conventional marketing, small and low-grade produce is not rejected until it reaches local retail store, when the retailer takes the loss. The needless waste of containers, freight, and labor is enormous. The U. S. Department of Agriculture is conducting several studies to develop new uses for surplus agricultural products.

Whether prepackaging will increase a particular cooperative's returns to members will depend on a large number of factors which each association must weigh in the light of its own conditions. But prepackaging is undoubtedly here to stay, at least for such commodities as apples, oranges, and white potatoes marketed cooperatively. And although there is much yet to be learned about prepackaging, many of the kinks have been removed. It is a promising field for exploration in the years ahead.

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#### TUNNEL COOLERS CHILL GRAPES QUICKLY

Specially designed tunnels, which precool grapes to suitable temperatures in one hour, will enable West Coast growers to cut the shipping time from harvest to market by 14 to 24 hours, according to USDA plant physiologists. Funds from the Research and Marketing Act have made it possible to conduct detailed performance tests of two commercial tunnel coolers built in California in the past two years.

The main reason for precooling grapes quickly is to keep them from losing moisture and from developing decay. The current practice is to precool the fruit to as near 45 degrees F. as possible after the lugs are packed. The cooling is done either in cold storage rooms or in the refrigerator cars. It requires from 14 to 18 hours and generally delays shipment a full 24 hours. In a period of declining markets, the delay may mean heavy losses to the shipper.

A model tunnel cooler developed in 1938 served as a basis for the design of the two commercial coolers under study. Since it was recognized that the quickest way to improve cooling was to expose the fruit to blasts of cold air, a tunnel was devised where this could be done as the unlidded lugs were moved slowly to the lidding machine. Air directed on the open faced lug at a velocity of 600 feet per minute cooled the grapes in an hour.

ALVIN C. McCORMACK NAMED  
TO HEAD ACP COMMODITIES BRANCH

Appointment of Alvin V. McCormack of Lewiston, Idaho, as Director of the Agricultural Conservation Programs Branch, Production and Marketing Administration, was made recently by Ralph S. Trigg, PMA Administrator. This position was held by Albert J. Loveland before his appointment as Under Secretary of Agriculture. Since that time, W. B. Crawley, PMA assistant Administrator for Production, has been acting as Director of the Branch.

As head of the ACP Branch, Mr. McCormack will be responsible for coordinating the planning and administration of the Agricultural Conservation Program. This program is carried out on three million farms, which include nearly two-thirds of the crop land of the United States, through the elected community and county farmer committee system.

Mr. McCormack has devoted his entire life to agricultural production and management work. He is the owner-operator of a large general farm in Idaho. In addition to his direct production experience, Mr. McCormack has broad background in marketing and business organization work.

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KANSAS CITY PMA COMMODITY DIRECTOR NAMED

Woodrow R. Walton has been named Director of the Production and Marketing Administration Commodity Office at Kansas City, Missouri, succeeding Peter E. Bowers, who has resigned. This announcement was made November 24 by Ralph S. Trigg, PMA administrator.

Mr. Walton who had been Assistant Director of the PMA Commodity Office at Chicago, and who had similar responsibilities at Kansas City several years ago, assumed the duties of his new position on December 1.

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USDA ANNOUNCES JANUARY-MARCH MEAT ALLOCATIONS:

The U. S. Department of Agriculture announced December 8 the allocation of 10,990,000 pounds of meat and meat products for commercial export, largely to U. S. Government projects, the Philippines, and the American Republics, during the January-March quarter of 1949.

Because of strong domestic demand for meat, the allocations have been held to a minimum and have been restricted to countries that normally depend on the United States for essential supplies. The total allocation represents less than one-fifth of one percent of anticipated U. S. production for the January-March quarter of 1948. It compares with an allocation of 13,400,000 pounds for the January-March quarter of 1948.

## MARKETING BRIEFS:

Cotton.--Cotton stored on farms as well as in warehouses will be eligible for an advance of \$50 a bale, pending official classification of cotton offered for Commodity Credit Corporation loan, the Production and Marketing Administration of the U. S. Department of Agriculture announced early in November. This emergency program is to operate through County Agricultural Conservation Committee offices and will protect farmers against the necessity of selling cotton below loan levels because of inability to obtain immediate classification. The advance of \$50 a bale will be secured by chattel mortgage on the cotton. The amount of the difference between \$50 a bale and the full amount of the loan at 92 1/2 percent of parity will be paid the producers when classification of the cotton has been completed....USDA announced that as of November 19 more than 7,000,000 bales of cotton had been classed by its 26 classing offices in the cotton belt, an all-time high record compared with corresponding periods of past years. This 7,000,000 as of Nov. 19 compares with 6,299,640 bales classed in the entire 1947 season. More than 5,000,000 bales have been classed for farmer-members of organized cotton improvement groups under the Smith-Doxey Act, straight loan classifications have numbered approximately 1,000,000 bales, and the remainder have been classed under the Grade and Staple Statistics Act, and the Cotton Futures Act.

Dairy Products.--Between October 26 and November 26 activities concerning milk market agreements and orders included: USDA recommendations on producer proposals for an increase in the Omaha (Nebraska)-Council Bluffs (Iowa) market in differentials over the basic milk price for Class I (fluid milk) and Class II (fluid cream); recommendations by USDA on producer proposals for an increase in the Sioux City, Iowa, market in differentials over the basic milk price for fluid milk and cream; an announcement by USDA of a public hearing November 4 on a producer-proposed price amendment to Federal Milk Order 30, regulating milk handling in the Toledo, Ohio, marketing area; issuance of a USDA decision on proposed marketing agreements and orders regulating the handling of milk in the Cincinnati, Ohio, and the Toledo, Ohio, and the Tri-State (West Virginia, Ohio and Kentucky) marketing areas; USDA issuance of a decision, subject to approval of the milk industry of Minneapolis-St. Paul, Minn., that the difference between the producer price for Class I milk and the price determined for milk for manufacturing uses be increased 30 cents per hundredweight for the months of August through November for the purpose of maintaining milk production for the market; announcement of a public hearing on November 4 on a producer-proposed price amendment to Federal Milk Order 978, regulating milk handling in the Nashville, Tenn., marketing area; USDA announcement of a decision to amend the agreement and order regulating the handling of milk in the Louisville, Kentucky, marketing area, so as to establish specified minimum prices for Class I and Class II milk during the next few months; and announcement of a public hearing on December 8, in New York and December 9 in Albany, requested by producers and handlers, on proposed amendments to the Federal order regulating the handling of milk in the New York metropolitan marketing area.

Fats and Oils.--USDA announced late in November that PMA will grant upon application, licenses for the importation of 5,000 metric tons of palm kernel oil or palm kernels (oil equivalent) and 1,500 metric tons of olive oil. These are in addition to the amounts granted early in the month for importation of 4,500 metric tons of coconut oil from Ceylon and Malaya, and 4,500 tons of high lauric oils from Portuguese areas, Italian Africa, and Liberia. The 5,000 metric tons of palm kernels or palm kernel oil that may be imported are from reserves set up by the International Emergency Food Committee. Licenses will be granted for importation from any source but no individual license will be in excess of 1,000 tons of palm kernel oil or the oil equivalent in palm kernels. The importation of the 1,500 metric tons of olive oil now available for licensing will exhaust the reserve that may be licensed this year. This oil will be licensed as edible or inedible olive oil (other than sulphur- or-foots olive oil), and may be mixtures of olive oil with other oils.

Fruits and Vegetables.--In mid-November USDA announced a program designed to encourage exports of U.S. fresh and processed citrus fruits (except limes) to European countries eligible to receive aid under the Foreign Assistance Act of 1948. The program provides for payments of one-fourth of the gross sales price (computed before deduction of such payment) basis f.a.s. U.S. port. Such gross sales price shall not exceed the domestic market price of the product at the time of sale and place of delivery as determined by the Administrator, PMA.

Grains and Grain Products.--USDA has announced that effective as of December 1, 1948, CCC will buy all grain for export to cash-paying Governments outside the Western Hemisphere and the Philippines except for grain already allocated and covered by commercial contracts signed prior to December 1. Also, in line with policy announced November 29 by the Economic Cooperation Administration, CCC will buy all grains for export to Marshall Plan countries except for the quantities covered by ECA purchasing authorizations issued prior to November 23. (Some Marshall Plan countries are also cash-paying countries. To the extent that these buy grain for cash the cut-off date for commercial procurement is November 30, 1948.) Procurement of flour for all countries, except the occupied areas (U.S.-U.K. and French Zones of Germany, and Japan and Korea), Austria, Trieste, Greece, and China, will continue to be made by private suppliers. For the first quarter of 1949, flour will be allocated to importing countries only in terms of wheat, and the proportion of the allocation for any country to be shipped in the form of flour will be left optional with that country. However, in the case of shipments of wheat and flour to ECA-financed countries, the minimum flour shipments will be determined by ECA.

Tobacco.--CCC average loan rate and schedules of rates by grades of 1948-crop Burley (type 31) tobacco were announced October 25 by PMA in accordance with legislative requirements. The loan rates, which will be available on a grade basis to all cooperating growers, average 42.4 cents per pound, which is 90 percent of the parity price for Burley tobacco as of September 15, 1948. The 1947 Burley loan rates averaged 40.3 cents per pound. Under the 1947 loan programs, approximately 34,000,000 pounds of Burley were placed under loan; the 1946 loan total was 135,000,000 pounds.

## ABOUT MARKETING

The following addresses, statements, and publications, issued recently, may be obtained upon request. To order, check on this page the publications desired, detach and mail to the Production and Marketing Administration, U. S. Department of Agriculture, Washington 25, D. C.

### Addresses and Statements:

Agricultural Education for Democracy, by Charles F. Brannan, Secretary of Agriculture, at Washington, D. C., November 9, 1948. 14 pp. (Processed)

The Agricultural Pendulum, by Charles F. Brannan, Secretary of Agriculture, at Portland, Maine, November 13, 1948. 7 pp.

The Flaxseed Outlook for 1949, by George L. Prichard, Director, Fats and Oils Branch, PMA, at Minneapolis, Minn., November 5, 1948. 8 pp. (Processed)

### Publications:

Cost and Quality of Cotton Ginning Services in California, Season 1946-47. (PMA) October 1948. 42 pp. (Processed)

Summary of the Marketing Quota Provisions of the Agricultural Adjustment Act of 1938, Including Amendments Made by the Agricultural Act of 1948. (Office of the Solicitor) 1948. 33 pp. (Processed)

Planning and Equipping School Lunchrooms. (PMA) PA-60. July 1948. 19 pp. (Printed)

U.S. Standards: Grapefruit, August 20, 1948; Oranges, September 14, 1948; Filberts in the Shell, September 10, 1948; Tangarines, September 18, 1948; Cleaned Virginia Type Peanuts in the Shell, September 18, 1948 Separate pamphlets. (PMA) 1948. (Processed)

Summaries of 1948 Marketing Seasons: South Carolina Peaches, October 1948. 14 pp.; North Carolina Peaches, August 1948, 4 pp.; Arkansas Peaches, July 1948, 4 pp.; South Carolina Watermelons, July 1948, 7 pp.; Florida and Georgia Watermelons, July 1948. 5 pp.; Arizona Salt River Valley Cantaloups, July 1948. 7 pp.; White Potatoes, Eastern Shore Virginia and Maryland, July 1948. 7 pp.; Mississippi Vegetables, June 1948. 10 pp.; Texas Vegetables 1947-48 Season, 11 pp.; (PMA) Separate publications. (PMA) 1948. (Processed)

Prepackaging Fruits and Vegetables by Cooperatives. (Farm Credit Administration) MR-126. October 1948. 20 pp. (Processed)

Soybeans in American Farming. (Bureau of Agricultural Economics) TB-966. November 1948. 66 pp. (Printed)

People and Potatoes. (Bureau of Agricultural Economics) AIS-76  
September 1948. 8 pp. (Printed)

Citrus Fruits: Acreage, Production, Farm Disposition, Value and  
Utilization of Sales, Crop Seasons 1946-47 and 1947-48. (BAE) October  
1948. 10 pp. (Processed)

Farm Costs and Returns, 1945-47: Commercial Family-Operated Farms  
in 6 Major Farming Regions. (BAE) FM-70. 18 pp. (Processed)

Consumption of Fluid Milk and Cream in Northeastern Marketing Areas.  
(BAE) October 1948. 53 pp. (Processed)

Marketing and Manufacturing Margins for Hides and Skins, Leather and  
Leather Products. (BAE) TB-961. July 1948. 87 pp.

Analysis of Hedging and Other Operations in Grain Futures. (BAE)  
TB-971. August 1948. 83 pp. (Printed)

Changes in Farm Production of Chickens and Eggs, 1924-48. (BAE)  
FM-67. June 1948. 36 pp. (Processed)

Local Market Vegetable Supplies for the New York Metropolitan Area.  
(BAE) July 1948. 59 pp. (Printed)

Trends in the Tenure Status of Farm Workers in the United States  
Since 1880. (BAE) July 1948. 36 pp. (Processed)

Suggestions to Prospective Farmers and Sources of Information.  
(BAE) June 1948. 23 pp. (Processed)

Naval Stores Report for First Quarter, April 1-June 30, 1948. Pro-  
duction, Distribution, Consumption and Stocks of Turpentine and Rosin  
and Production and Stocks of Miscellaneous Naval Stores for the United  
States. (BAE) August 1948. (Processed)

Outlook for Hops From the Pacific Coast. (BAE) November 1948. 40  
pp. (Processed)

Apple Production, by Varieties, by Areas, 1947 and 1948. (BAE)  
August 1948. 2 pp. (Processed)

Drying Combined Rice. (Bureau of Plant Industry, Soils, and Agri-  
cultural Engineering) July 1948. 17 pp. (Processed)

Marketing Dairy Products, 1936-1940: A List of References. (USDA  
Library) Library List No. 43. June 1948. 75 pp. (Processed)

Potatoes for Livestock Feed. (PMA) MP-676. October 1948. 45 pp.  
(Processed)

Soybeans Harvested for Beans: Acreage, Yield and Production, 1946  
and 1947. (BAE) July 1948. 38 pp. (Processed)

